

## **E. MANAGEMENT INFORMATION SYSTEM**

### **InSyst ®**

The San Diego County Mental Health Plan (MHP) uses the InSyst system to register clients into the mental health system and to record each client's episode of service activities. The InSyst system also tracks Short-Doyle/Medi-Cal and third-party billing. The MHP contracts with the UBH MIS Department to support and maintain the InSyst system.

Using the InSyst system, organizational providers enter the data for client registration, episode and service activity on line. InSyst performs various validations to assist with accurate data entry: for example, InSyst will show a provider if a client being registered is already open in that provider's program, and will indicate whether a particular staff member is qualified to bill for a specific service. InSyst can provide the following client tracking and billing information to authorized users 24 hours a day, seven days a week:

- On-line Client Locator
- Instant Client Status Information
- Medi-Cal Eligibility Inquiry
- Client Registration
- Service History Inquiry
- Utilization Review
- "Significant Other" Tracking
- Financial Information and UMDAP (Uniform Method for Determining Ability to Pay) Tracking

The InSyst system supports on-line financial assessments. It will perform Medi-Cal, Medicare, third party insurance, and client billing functions as well as electronic payment processing and many accounts receivable tasks.

The InSyst system resides on a VAX 7820, which is housed in a secure computer room at the office of the County's Information Services vendor, the Pennant Alliance.

### **Provider Support through UBH Customer Service (Help Desk) for InSyst**

MHP Organizational Providers can obtain support for InSyst through the UBH MIS Customer Service Desk (Help Desk). The Help Desk can assist a provider with technical support or special requests and may be contacted as follows:

Phone: 619-641-6928

Fax: 619-641-6975

Emails: [helpdesk@sdubh.com](mailto:helpdesk@sdubh.com)

All requests received by the UBH MIS Help Desk are logged and a Technical Support Specialist will be assigned to follow up on each provider request.

Help Desk support is available as follows:

### ***During Business Hours***

Normal business hours: Monday through Friday, from 8 a.m. to 5 p.m. (Holiday coverage is detailed below.)

Staff is available to handle problems, which include:

- Password expired; cannot log on to system
- Printer won't print a face sheet or a report
- Cannot obtain reports
- Need to use a different printer
- Creation of new user accounts
- Training issues and questions

### ***After-Hours Support***

UBH provides after-hours technical support for InSyst users. UBH MIS staff is available through a voice messaging pager system, which allows a caller to leave a detailed message for the support center. The pager system is operational on the following schedule

Monday through Friday: 6:30 a.m.- 8:00 a.m. and 5:00 p.m.- 9:00 p.m.

Saturday and Sunday: 9:30 a.m.- 5:00 p.m.

The customer service pager number is: 619-893-4839

Some examples of support calls that may be handled after hours are:

- Can log on to network, but cannot log on to DOC or InSyst.
- When dialing the County modem, there is no response or the modem disconnects immediately.
- Logged in, but InSyst seems frozen. No data can be entered.
- Program errors in Service Entry screen or other data entry areas.

### ***Emergency-Only Support***

In some rare instances, providers may have serious problems with InSyst after hours, revealing an emergency situation, which affects all users. (Individuals or organizations experiencing a

problem unique to their site must seek assistance from their technical support department, since UBH cannot support any non-UBH equipment.) Such emergencies may include:

- InSyst application failure – application is not available or system error messages indicate a fatal error
- Operating system failure (generally identified by Pennant Alliance staff)
- VAX system hard disk failure; need to restore from backup (generally identified by Pennant Alliance staff)
- Journaling files or database files are corrupt (generally requested by Information Services and Pennant Alliance staff)

In such an emergency, contact the Customer Service through its pager number 619-893-4839.

### ***Holiday Support***

Provider support is available through the pager system for emergency problems which occur on the following holidays: New Year's Day, Martin Luther King, Jr. Day, Memorial Day, Independence Day, Labor Day, Thanksgiving and the day after, and Christmas Day. Please note that when holidays fall on a Saturday, they will be observed the preceding Friday and when holidays fall on a Sunday, they will be observed the following Monday.

### **Connecting to the System**

Most County-operated facilities have a direct connection to the VAX via the County's INET. Several larger contractors have dedicated data lines that support continuous connection to the VAX. However, most MHP organizational provider contractors connect to the VAX and log on to InSyst via dial-up modem connections or Remote Access Server (RAS) connections. The County's information services vendor, the Pennant Alliance, has established both telephone and access code numbers for this purpose.

Note: New providers should contact the UBH MIS Help Desk at 619-641-6928 to determine their best dial-in solution and to establish the appropriate access codes.

### **System Training**

Training is available for providers who use the InSyst system. InSyst data entry and look-up training is offered monthly and reports training or special module training is also available. For training inquiries, please contact UBH MIS at the above numbers. Users may also access: <http://www.ubhpublicsector.com/sandiego/sdmishelp.htm> to see the latest training schedule.

*Note: Users must apply for or have an InSyst user account to attend InSyst basic training.*

### System Authorization

The County's Health and Human Services Agency (HHS) Information Technology System Security Department coordinates access to the agency's computer systems. Since the InSyst system is the County's mental health database and resides on a County computer network operated by the County, the System Security Department must authorize all requests for user access. Providers who need access to InSyst must complete the following forms to establish a User Account:

- Computer Services Registration Form (for Pennant Alliance/County)
- Remote Access Form—for modem users only (for Pennant Alliance/County)
- Confidentiality Policy (included in County Summary of Policies)
- InSyst User Authorization Form (for UBH)

The forms are processed by Pennant Alliance in coordination with the County's Internal Security to set up the VAX user account and AS5200 (Secured Modem) user account. Pennant Alliance or Internal Security notifies UBH who then creates a user account for the new agency within InSyst. Pennant or Internal Security then calls the provider and informs them that the account has been set up and presents the provider with their user name(s) and password(s). Forms can be obtained by contacting the UBH MIS Help Desk at 619-641-6928, and completed forms can be mailed or faxed to UBH for processing at the following address:

UBH MIS  
3111 Camino Del Rio North, Suite 500  
San Diego CA 92108  
Fax 619-641-6975

#### **NOTE !**

For system security, providers must notify UBH when staff with access to InSyst move, change jobs, or are terminated.

Users are given general lookup privileges for client, episode, and service information. However, data entry and update privileges for specific reporting units must be authorized by the user's program director.

### Clinical Staff Profiles

Each person whose services or MAA Activities are recorded through InSyst must have a Staff Identification Number. This number is tied to a profile specifying the training and duties of the staff person to whom it belongs. The information is used in determining whether a given activity may be billed if provided by that staff member, e.g., certain procedure codes may be used only by Physicians, some only by Psychologists and Interns, others by All Licensed and Waivered staff, and others by All Staff. As a consequence it is essential to update the profile when a staff member's status changes, for example when a waived intern becomes actually licensed. Requests for Staff Identification Numbers are made to UBH by the

organizational provider program employing the individual, and UBH will seek approval of the application from the Program Monitor. Download the form, “New Staff Provider Assignment Form” from the UBH Website at <http://www.ubhpublicsector.com/sandiego/sdmis.htm>. UBH must also be informed when this type of staff member leaves your program.

### Security and Confidentiality

The County’s mental health database must be protected from unauthorized use. Providers must ensure that only users with “need to know”, who have signed confidentiality statements, are permitted to use the database. Sharing of passwords or allowing unauthorized individuals access into the system is strictly prohibited. All terminals and computer screens must be protected from the view of unauthorized persons. Reports with confidential client information are required to be stored in a secure place and properly destroyed when no longer needed.

In order to preserve the integrity of InSyst, providers must notify UBH Help Desk (619-641-6928) when a person with InSyst access moves, is terminated, or changes jobs. The InSyst User Authorization Form and the Computer Services Registration Form must be faxed to the UBH Help Desk 619-641-6975 with the “Terminate” box checked off. UBH will then remove the person’s InSyst access and add the replacement’s name. UBH will also notify Pennant Alliance to have them ‘deactivate’ the accounts.

### User Manual and Reports Manual

Every program using the InSyst system is expected to maintain updated copies of the UBH InSyst User Manual and the UBH InSyst Reports Manual. These manuals were given to all contracted organizational providers and County-operated facilities during system implementation. New programs coming online, or existing programs with a need for new manuals, may request them by calling 619-641-6928.

The appendices to the User Manual contain important information related to data codes allowed by the system. These appendices are updated from time to time and are available to providers at the UBH Website: <http://www.ubhpublicsector.com/sandiego/sdmishelp.htm>. Managers must ensure that the updated appendices are inserted in the User Manual and that staff is informed about the changes.

Contractors shall follow billing procedures contained in the organizational Provider Financial Eligibility & Billing Procedure manual.

### InSyst Reports

A number of reports may be generated directly from the InSyst Reports Menu and printed at local or remote printers. Most reports may be requested directly from the system by authorized

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system users, while other InSyst reports are generated by UBH MIS personnel and distributed to the programs on a monthly schedule. Some of the most frequently used InSyst reports available to programs are listed below. Please note that some reports require a significant block of time to run, which can slow system performance if run during the business day; these reports should be run after hours, as noted in the “When Run” column.

Report Number	Report Name	When Run	Notes
PSP100	Primary Staff Caseload Report	After Hours	See InSyst Reports Manual. Some users prefer the less detailed MHS802 report.
PSP101	Service Detail Report	After Hours	See InSyst Reports Manual. This is the standard Service Detail Report. This report sorts by staff and includes demographic and diagnostic information. Many users prefer the less detailed MHS801 report.
PSP102	Daily Service Audit Report	Any Time	See InSyst Reports Manual.
PSP104	Indirect Services	Any Time	See InSyst Reports Manual. Use this report to monitor Medi-Cal Administrative Activities (MAA).
PSP117	Provider Staff Activity Analysis Report	After Hours	See InSyst Reports Manual.
PSP118	Client Episode History Report	Any Time	See InSyst Reports Manual.
PSP119	Absence of Service Report	After Hours	See InSyst Reports Manual.
PSP121	Program Caseload Report	Any Time	See InSyst Reports Manual.
PSP123	24-Hour Daily Attendance Log	Any Time	See InSyst Reports Manual.
PSP131	Reporting Unit Service Summary Report	After Hours	See InSyst Reports Manual.
PSP138	Service Entry Performance	After Hours	See InSyst Reports Manual.

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MHS140	Client Information Face Sheet	Any Time	See InSyst Reports Manual.
PSP186	Missing Social Security Number	Any Time	See InSyst Reports Manual.
MHS164	Liability Due Report	After Hours Monthly	See InSyst Reports Manual. This report is distributed by MIS and is directed to go to the program's default printer.
	Unbilled Medicaid Services	After Hours Monthly	See InSyst Reports Manual. Day Programs may use this report to see unauthorized services. This report is distributed by MIS and is directed to go to the program's default printer.
	Accounts Needed	After Hours Weekly	See InSyst Reports Manual. This report is distributed by MIS and is directed to go to the program's default printer.
	Staff Caseload Summary Statistics	After Hours Monthly	See InSyst Reports Manual. MIS submits this report on a monthly schedule.
PSP280	Physician Caseload Report	Any Time	See InSyst Reports Manual.
PSP577	Insurance Approval Report	After Hours Monthly	This report is distributed by MIS and is directed to go to the program's default printer. The report helps staff identify insurance policies that need attention in InSyst.
MHS800	Episode Face Sheet	Any Time	This face sheet shows the detail of a client's episode.
MHS801	Service Detail Report	After Hours	This report is sorted by client and has less demographic and diagnostic data than the PSP101

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MHS802	Primary Staff Caseload Report	After Hours	This report shows less detail than the PSP100.
MHS804	Staff Service Detail Report	Any Time	Use this report to review the activity of one staff at a time. To review the activities of the entire staff, use the MHS801 or PSP101.
MHS807	Admits & Discharges Report	Any Time	Users may run this report to show admissions and discharges at their program during a given period of time.
	Program Caseload Report for CSI Required Data	After Hours	Users may run this report to review caseload for CSI required data elements. The report is used as a tickler to remind program staff to update required data in InSyst.
MHS831	Service Summary Report	After Hours	This report is similar to the PSP131 but includes a column for total time in minutes. This report also calculates group size, including the number of staff assigned to the group, to determine total hours for group procedure codes.
	Annual Review Report	After Hours	This report is submitted by MIS and directed to the program's default printer. The report is used as a tickler to remind program staff to update required data in InSyst.

Note: If you do not see one of these reports on your Reports Menu and you wish to receive it, please call the UBH MIS Help Desk at 619-641-6928.

**NOTE:** Failure to receive an InSyst report (including client Face Sheets), password resets, training questions or scheduling are not considered an emergency and will be handled the next business day.

### Other Reports

UBH produces many other reports that are made available to programs via the Internet. Some of these reports include:

- Report 4a – Medi-Cal Claims Summary Report
- Report PSP354 – Units of Service Report



- Report PSP356 – Cost Report (Medi-Cal Units Report)
- Report MIS-6 – Admissions, Discharges and Census Report
- Provider Tracking Report

Users may visit the web site at:

<http://www.ubhpublicsector.com/sandiego/sdprovreports/sdoprpts.htm>

Note: A username and password is required to download the reports from the website. Users may contact 619-641-6928 to obtain a password and directions.

### New Reports

County Mental Health and UBH are also introducing new reports to assist programs with monitoring their Medi-Cal services and data entry performance. While these reports are introduced, the format and distribution method may vary. Some of the reports intended for contractors may be saved on compact disc and made available via the Contracts office. For example, this year, UBH prepared new Detail Direct Service Reports for contractors. These reports were saved as Excel spreadsheets with multiple tabs. The tabs include:

- The "Posted but No Medi-Cal" has services that are completely posted but the services did not bill Medi-Cal. This tab would include non-billable services but would also include Medi-Cal billable services that did not bill to Medi-Cal, usually because there is no eligibility in the system.
- The "Posted Medi-Cal" tab has all services that billed to Medi-Cal or to a payor mix including Medi-Cal.
- The "Services Stuck in Posting" tab include services that are "stuck" in posting because the system is waiting for further action. For example, "Insurance Policy not currently ready" indicates that a Medicare or Insurance policy is on hold and the user must determine if policy is viable and insert three X's in the insurance policy screen. Once corrected, these services can move to the next stage in the posting and claiming process.
- The "All Other Services" tab will include all other services, i.e, services that are newly entered and have not yet posted (the system has a 7 day window before services post).

Another new report that is being introduced this year is the Medi-Cal Denials Report. This detailed report shows the services that were claimed to the State Medi-Cal program but were denied and not paid.